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Wealthtech Weekly

June 26, 2025

By Rob Burgess
Reporter

Have you noticed a drop in your website's visits since Google introduced AI Overviews? Alvin Carlos, of District Capital Management in Washington, D.C., sure did. In May 2024, when the search feature debuted, his monthly traffic was down immediately by nearly half. He and other advisors told me about how they've adjusted their SEO practices in the era of "zero-click" searches.

How have you been affected? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

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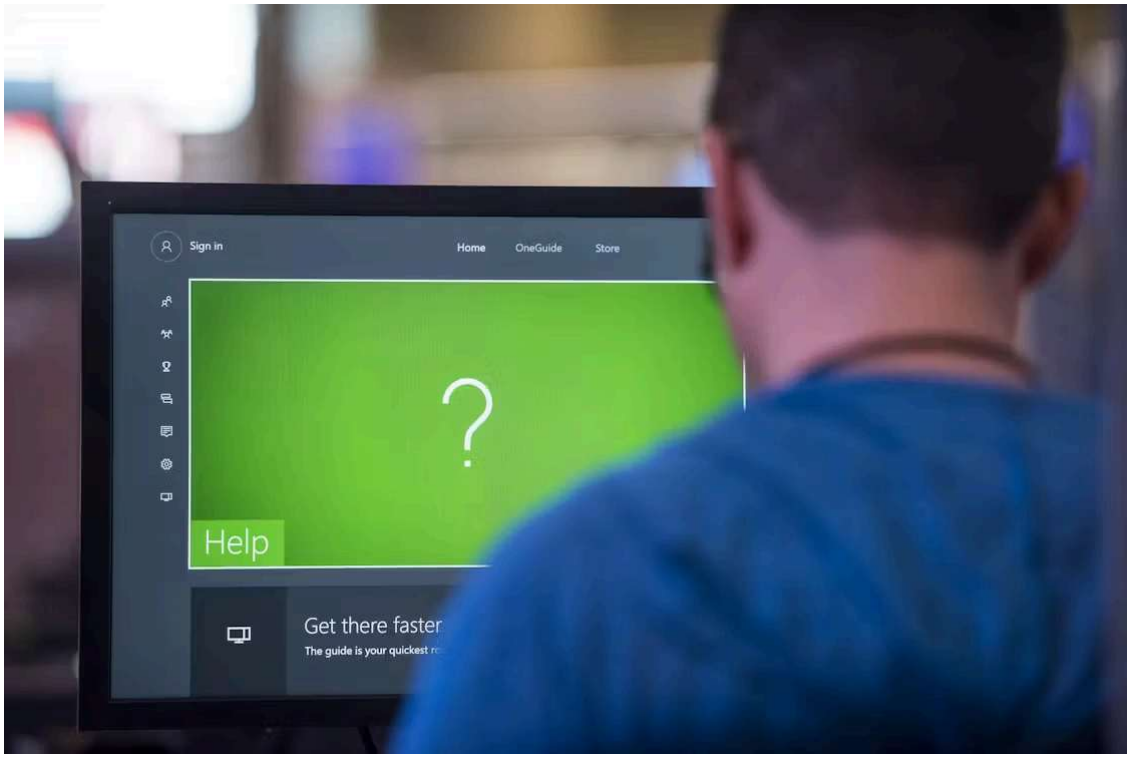
TOP STORIES

TECHNOLOGY

AI-powered search is re-writing SEO rules, and advisors must adjust



Traditional methods of driving traffic to a firm's websites aren't enough in the new "zero-click" search results world.

- **Aaron Klein's new firm has an agenda: 'Kill bad meetings'**
  The ex-Nitrogen CEO's new company, which plans to launch its first products in the fall, commenced operations Jan. 2 in Boise, Idaho, after raising $5.5 million in capital.
- **AI-powered firm's tech could expand planning market exponentially**
  Quinn's technology could open personalized financial planning to clients who long weren't on advisors' radar screens.
- **Envestnet partners with asset managers to provide alts access in model portfolios**
  Through collaboration with BlackRock, Fidelity Investments, Franklin Templeton and State Street, professionally managed model portfolios with

alternative allocations are available via the firm's unified managed accounts.

- **Tips and tricks for advisors seeking to grow their business**
  Finding the right time to launch a registered investment advisory firm and the importance of building lasting client connections all play into advisor success.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM DELOITTE

Retail investors expect notable growth in private capital by 2030

With existing regulated product structures, investment managers are eyeing retail investors for growth in private capital, predicting allocations to soar from billions to trillions by 2030.

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